Contents

03
Introduction

04
Project Work Flow

05
Tips for New Experts

07
Pitches

08
Sample Pitch

09
Interview

10
Statement of Work

11
Project Execution

12
Follow-on Work
We’re thrilled you joined our network of experts.

This handbook is designed to orient you to the platform experience and suggest some best practices to position you for success.

We have two types of projects on the platform and the process for bidding is different depending on the client:

**Exclusive Enterprise Projects**
Typically larger in size, these projects are posted by clients of Fortune 1000 scale and will be marked with an “Exclusive Enterprise Project” badge. Enterprise clients manage projects through the Catalant platform.

**All Other Projects**
Projects without an Exclusive Enterprise badge are posted by small and medium business (SMB) clients. SMB clients manage projects through the “HourlyNerd powered by Catalant” platform.
We’ve outlined key steps in each process below, to guide you from placing bids through the completion of your first project.

**Step 1**
Project Posted

Client posts a project, which includes a brief description of services needed, estimated timeline for work, and anticipated budget

**Step 2**
Project Discovery & Decision to Pursue

Expert discovers project posting and decides to pursue

**Step 3**
Bid Submission

Exclusive Enterprise Projects
A. Pitch Submission and Review
B. Interviews
C. Submit Statement of Work (SOW)

All Other Projects
A. Bid Submission

**Step 4**
Bid Review & Selection

Client reviews bids and selects expert for the project
Catalant system notifies expert they were selected

**Step 5**
Project Launch

Selected expert drives project to completion

**Step 6**
Project Marked Complete & Payment Executed

Once all deliverables have been submitted, both the client and expert mark the project as "complete" within the project workspace on Catalant
Client and expert submit feedback for one another and Catalant transfers payment to the expert
Build a Robust Profile

Creating a strong profile is the first step in finding high-value work on your time and your terms.

Investing in building a profile that is detailed and exhaustive will pay dividends in the form of improved win rates and more relevant project suggestions.

Upload a clear, professional photo.
Potential clients want to see the face behind the name, an important start to building a relationship.

Input a personal tagline and "About Me" section.
A concise and compelling headline can grab attention, while a high level overview of who you are (e.g. languages, certifications, technical skills, etc.) can set your profile apart from the competition.

Designate your areas of expertise.
While you can highlight multiple skills, it’s smart to focus on the 3-5 areas where you are strongest. Having too many skills listed on your profile dilutes our system’s ability to recognize core strengths.

Be specific in describing your experience.
Add detailed descriptions to your work experience, including the types of projects or specific initiatives you worked on at each company. For example, if you worked on various projects as a management consultant, be sure to list specific skills, project types, and/or industry expertise you gained through that work.

Keep your profile up-to-date.
Our clients browse expert profiles every day so make sure it’s clear whether you’re currently available for full- or part-time engagements.
Identify the right opportunities.

You’re now part of a network of 30,000 top-tier experts. You have a higher likelihood of winning work if you focus your bidding efforts on projects that align most closely with your skillset, experience, and interests.

Focus on the projects posted more recently.

Clients tend to review pitches on a rolling basis. Bids submitted within 24-48 hours of a project being posted on the platform tend to move through the consideration phase more quickly and stand out from other bids.

Perseverance pays off.

Try not to get discouraged if you don’t win the first several bids you submit – an expert typically places multiple bids before winning their first project.

Check in often.

Catalant clients post new opportunities every day. Make sure you’re monitoring the live project postings so you don’t miss your perfect project.

Be aware of the competition

Take note of how many other bids have already been submitted for a project. Unless you’re truly the perfect match, it can be challenging to stand out in an already-saturated market.
Develop an Effective Pitch

The first step in pursuing projects is submitting a pitch.

The pitch is your opportunity to make a strong first impression on the client - try using these tips from successful experts on our platform to increase your chances of getting chosen for an interview.

Sell yourself!
Clearly and confidently articulate why your expertise, experience, and enthusiasm make you the best candidate for the project.

Address the client’s needs.
Explicitly address each project requirement so it’s clear that you understand what they’re looking for and that your qualifications are uniquely suited to their needs.

Be as specific as possible.
Include examples of similar projects you’ve completed. Statements like “Please refer to my resume” don’t demonstrate to the client why you are best-suited for the project. If the project isn’t well-defined, be as specific as you can and you’ll have the opportunity to provide more detail on your background if you’re selected for an interview.

Upload supporting documentation.
Attach an updated resume and past sanitized work product (when appropriate) to showcase your skills. Just make sure any past work products are meticulously cleaned from any confidential information before uploading.

Use the technology.
Client correspondence will occur through Catalant’s platform so there’s no need to include personal contact information.

Don’t be afraid to follow-up.
Once a client has reviewed your pitch, you have the ability to message them through the platform. You should feel empowered to reach out and ask a business if they need more information in order to move forward or make a decision.
Here is an example of compelling language you might use in your pitch. Every project is different, so we encourage you to get creative.

<table>
<thead>
<tr>
<th>Demonstrate enthusiasm</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would love to assist with this project and have the expertise to add significant value to your organization.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Introduce why you believe you’re the right person for the job.</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have 20 years of experience in the retail industry, an MBA from the Kellogg School of Management, and have executed on multiple projects specific to logistics strategy for big box retailers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Describe your specific relevant experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>While VP of Strategy at BigBox Retail Co., I led projects for our international distribution team that enhanced the efficiency of our network, leading to millions of dollars in annual savings. I have also partnered with an emerging e-commerce brand on launching their distribution network from scratch.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Establish your availability and address specific project posting requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m available to begin this work immediately and can travel as needed for project success.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Wrap it up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attached are my resume and a sanitized example presentation that demonstrate my quality of work and expertise in this space. Please let me know if you need any other information to further understand my capabilities for your project. I look forward to leveraging my expertise in retail distribution to help your organization!</td>
</tr>
</tbody>
</table>

I would love to assist with this project and have the expertise to add significant value to your organization.

I have 20 years of experience in the retail industry, an MBA from the Kellogg School of Management, and have executed on multiple projects specific to logistics strategy for big box retailers.

While VP of Strategy at BigBox Retail Co., I led projects for our international distribution team that enhanced the efficiency of our network, leading to millions of dollars in annual savings. I have also partnered with an emerging e-commerce brand on launching their distribution network from scratch.

I’m available to begin this work immediately and can travel as needed for project success.

Attached are my resume and a sanitized example presentation that demonstrate my quality of work and expertise in this space. Please let me know if you need any other information to further understand my capabilities for your project. I look forward to leveraging my expertise in retail distribution to help your organization!
Impress in the interview

Congratulations on being selected for an interview!

The phone interview is an important milestone in launching projects. While clients use the interview to narrow the list of candidates, it’s also the best opportunity for experts to gather critical information about the client’s needs. Here are some suggestions for putting your best foot forward.

Come prepared

Save the calendar invitation attachment emailed to you when the interview time is confirmed, which includes the dial-in information and directions

Set an agenda for the call, including preparing any questions

Kick the call off with introductions, and be ready to drive the direction of the conversation

If the client is in a different time zone, confirm in advance that your calendar is showing the correct time

Highlight your project-relevant experience

Summarize your qualifications and present your candidacy with confidence

Demonstrate specific examples of relevant projects, initiatives, and experience

Probe on project details

Ask deliberate questions about the client’s organization and project context, goals, and timeline

Explore approaches the client is most receptive to and ask what tactics have been tried in the past

Establish a clear timeline for launch among both parties. If your ability to serve the project will be dictated by launching before a specific date, say so. Locking in your capacity is a compelling way to drive urgency with clients

Bring value to the conversation. Sharing insights and potential approaches in the interview will demonstrate your commitment to the project and bolster your position as an expert

Clarify client’s budget expectations

Understanding that budgets listed by clients are directional, clarify your assumptions and the client’s expectations

Don’t feel pressured to commit to a specific budget on the call unless the client prompts you to do so. Use the interview time to gather information so that you are able to set a realistic budget when you submit a Statement of Work (SOW) following the call.

Remember: The client only sees the total project cost, which includes Catalant’s fees on top of the expert’s take home amount. Make sure you’re accounting for these fees in any discussed rates and not discussing them as separate

Align on next steps

Confirm the timeline for when you will develop and send the client a subsequent SOW through the platform

Ask whether the client needs any additional information to evaluate your capabilities – conversely, if you need additional information from the client to better inform your offering, do not be afraid to ask for it! Reiterate that you are under confidentiality and select company data or sample documents would help you better tailor your SOW
After the interview, experts submit a Statement of Work (SOW), a written contract outlining a more thorough proposal for the project.

Formalize your offering

Outline your services, including a description of services to be provided, deliverables and approach, and timeline of services (including any deliverable-based milestones)

Propose a project budget, inclusive of your take-home amount and Catalant’s fees (do not break these into separate line items). You should break out any separate project expenses, such as travel, research reports, administrative items, etc.

Avoid ambiguity

Use crisp language to specify what is in-scope and what is out-of-scope. Be clear on definitions of key items (e.g. deliverables, timelines, budget, data sources, etc.):

Establishing explicit scope and milestones up front reduces the chance of future miscommunication and mismanaged expectations

Include necessary client commitments

Outline your expectations of the client to make sure all parties are aligned up front. Potential client commitments include the following:

- Information or data needed from client to execute work
- Scheduled interim check-ins or deliverable feedback sessions

Set clear payment terms

Include explicit language calling out that all payments will be made through Catalant to avoid confusion at the close of a project. This could be spelled out with language such as, “Expert will be paid upon client-approved project completion and funds will be transferred through Catalant.”

If any non-professional expenses (research reports, travel, etc.) may be incurred during the course of the project, they should be estimated and accounted for in the SOW. Vague language like “will be used at-cost” can result in misalignment of expectations.

For projects exceeding one month in duration and above $10,000, Catalant can issue deliverable-based payments when agreed upon by the client and expert in the final SOW. Please note milestone payments must be approved by the Catalant team prior to project launch. In all other cases, the expert is paid at successful project completion.
Once the client has approved the plan laid out in your SOW, it’s finally time to execute the project.

Your performance during the project is critical to your reputation on the platform and future success, so Catalant is here to help mitigate any potential bumps in the road. Here are some tips that can make your project a success.

**Establish recurring client check-ins.**
Having pre-scheduled regular touch points makes for better communication throughout the process.

**Be aware of all project stakeholders.**
Make sure you have insight into the ultimate project buyer and get feedback from all key stakeholders throughout the project. This facilitates better buy-in from the start, further aligns parties on the final deliverable, and helps avoid any potential surprises.

**Set high expectations up front.**
Confident experts kick off the project by setting a high standard and asking the client to tell them if at any point they feel the work doesn’t meet these expectations.

**Catalant is your partner and is always here to help.**
Our interests are aligned with yours in that we want every project to be a success. The earlier you reach out to us about any project challenges, the better we can assist.

**Keep all communications with a client on Catalant’s platform.**
Utilize the messaging feature and upload attachments in the project workspace. This creates a system of record for the project and allows Catalant to monitor its progression so payment can be made promptly. If a client suggests you go off-platform to discuss or complete a project, remind them of Catalant’s exclusivity clause that prohibits parties from transacting outside of the platform and the resulting risk of losing access to future project work.

**Don't forget to close it out!**
Once the client and expert have each marked the project complete on Catalant’s platform and the client confirms satisfaction with the work product Catalant will transfer payment to the expert’s US bank account on file within 5 business days. (For international payments, funds will be transferred to the expert within 10 business days.)
Generating follow-on work is a great strategy to keep your pipeline full of opportunities that align with your interests and expertise.

While Catalant's team is working around the clock to source projects for our network of experts, top experts have achieved success on the platform by generating new projects or extensions from existing client relationships. Here are tactics we’ve seen successful experts utilize to position themselves for additional work with existing clients.

** Surprise and delight!**
Experts play the most critical role in influencing a client's experience on Catalant, often shaping the client's perception of the value of non-traditional labor and consulting. Over-delivering or going the extra mile on your first engagement with a client is a great way to demonstrate your value-add as a flexible resource.

**Be aware of the big picture.**
Act like an advisor by taking time to understand your client's broader business objectives and challenges. That way, when your project is wrapping up, you are well prepared to propose specific follow-on projects to drive additional value for their business.

**Take initiative.**
If you believe the company can derive additional value from follow-on work with you, raise potential opportunities with the project buyer prior to closing the project.

**Stay in touch.**
This will help you stay top-of-mind for clients post-engagement. Periodically sending past clients a brief note asking how things have progressed since your project wrapped up or articles relevant to their business is a good “light touch” way to check in.

** Keep all additional work on Catalant's platform.**
Our terms of service require that additional projects with a client must be processed through our platform. Extensions and new projects are easy to launch through the platform - simply ask the client to post a “Private Project” on the platform and invite you to bid. This feature provides you with exclusive access to the project posting, allowing you and the client to re-engage and get back to work as soon as possible. Posting repeat work with Catalant will also enhance your profile and demonstrate the quality of your work to future clients.
Have questions about how to put these best practices into action?

Email us at supply@gocatalant.com or call us at 617-447-0073 to discuss!